ARH Source Selection Evaluation — An Evolution in Planning and Execution

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In the wake of the RAH-66 Comanche's termination, Army leaders began to review the process to equip the aviation reconnaissance force and to ensure a swift movement to that action. With the critical field necessity to rapidly acquire an Armed Reconnaissance Helicopter (ARH), the traditional acquisition process could not be used. Extensive problem solving ensued to determine how to reduce the days and months to get the helicopters in the hands of Army aviators. One major area requiring reevaluation for expediency was the Source Selection Evaluation Board (SSEB) process.

With the critical field necessity to rapidly acquire an ARH, the traditional acquisition process could not be used. By planning well in advance, building a strong management team and integrating a user-friendly database, the ARH SSEB finished all proceedings required in less than six months. (Bell Helicopter Textron photo by Ed Garza and Ben Gillian.)

Planning for the SSEB took primary focus following the ARH Industry Day in Huntsville, AL, Oct. 8, 2004. The ARH Project Management Office (PMO) directed a sizeable portion of its staff to switch from working the request for proposal (RFP) process to readying for the evaluation of the offerors' proposals.

The Planning Process Begins

An intense planning process was required — from setting up the right team, through all the tasks required to run the SSEB, to the source being selected and debriefs to offerors. References such as the *Army Guide to the Source Selection Process* and the *Federal Acquisition Regulation (FAR)* were instrumental. Our mission was to conduct the SSEB, starting by February 2005, to obtain a source decision by June 30, 2005, setting the conditions for a successful program. Any slip of time by the SSEB would produce severe consequences for the program and additional risk to the PMO. We knew this SSEB would differ from those in the past because of the extremely aggressive schedule planned. We had less than six months to complete an SSEB, which usually takes 12 months to accomplish.

Within the first few days of planning, the following key milestones were determined as crucial:

- Set up a planning cell and management team to immediately begin the planning process.
- Determine the appropriate SSEB team.
- Obtain facility space and equipment required to execute SSEB.
- Determine plan to coordinate/work with the Source Selection Advisory Council (SSAC) and the Source Selection Authority (SSA).

The Army has contracted with Bell Helicopter Textron to produce the force's next-generation ARH. The new ARH fleet will replace the battle-tested but aging OH-58D Kiowa Warrior helicopter fleet. Here, an OH-58D crew from the 1st Battalion, 4th Cavalry Regiment, 1st Infantry Division, lands at Forward Operating Base MacKenzie, Iraq, following an air combat patrol over the local province. (U.S. Air Force photo by SSGT Shane A. Cuomo, 1st Combat Camera Squadron.)

- Scope the entire SSEB event and obtain concurrence from the SSAC Chairman.
- Obtain SSA approval of the Source Selection Plan (SSP).
- Determine schedule of events (macro and micro levels).
- Train all SSEB personnel.
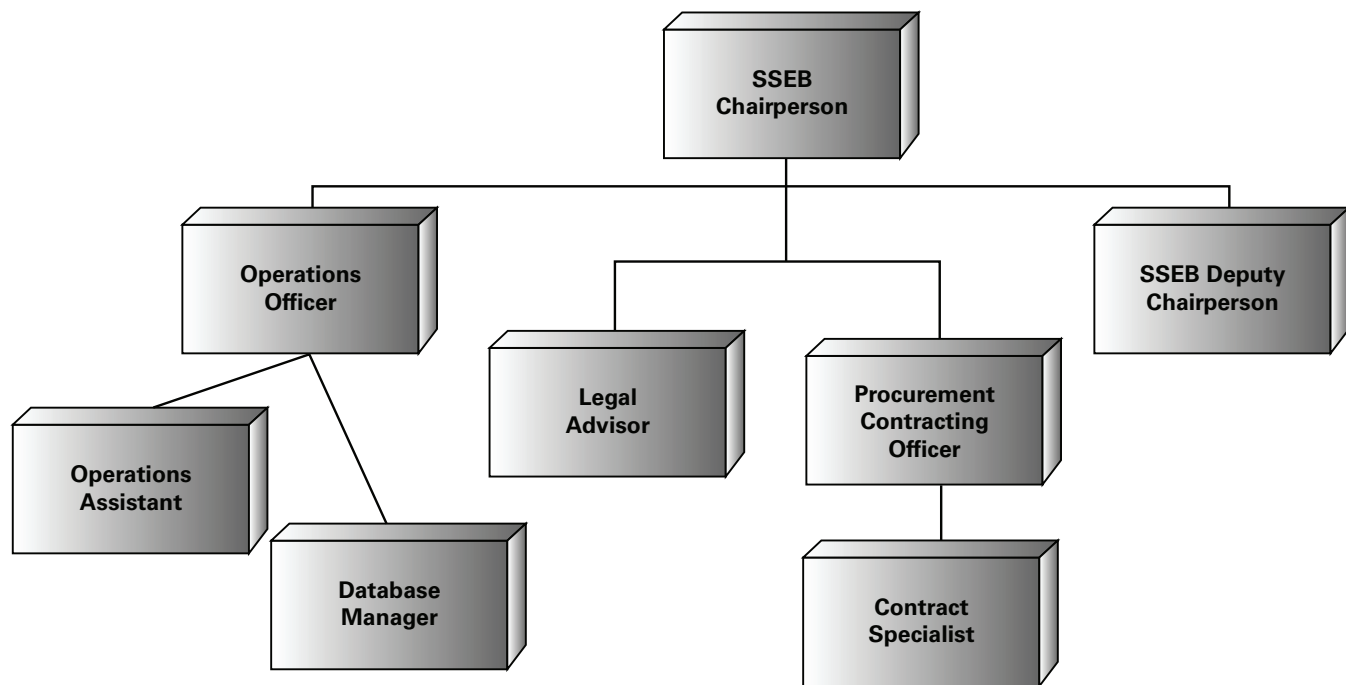- Develop database management and plan.

Selecting the Right People

The *Army Guide to the Source Selection Process* was our number 1 reference, but it lacked guidance on how to set up an SSEB. To manage this large SSEB, with a multidisciplined team exceeding 100 personnel, we knew the operational challenge would be overwhelming for just one or two people. We put together the "management team" to plan and execute all activities, as shown in the figure on the following page. Positions such as operations officer, operations assistant and database manager were additions to a typical SSEB management team.

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We selected the appropriate personnel to lead at all levels and detailed the smallest feasible number of personnel required to work as evaluators. Efficiency directed that we have a limited number of personnel in specific areas of discipline and to have other personnel on-call. Fortunately, the request for a government facility had already been submitted more than six months prior to the SSEB's start. This forethought expedited the finalization of the SSEB setup process. Obtaining a government facility is by far the best choice in support of security and control, but mainly because it comes at no additional cost to the PMO. A request for space should be made to the appropriate garrison facility management as soon as the need for an SSEB has been identified. A 6- to 12-month advance request is not uncommon, and a planner could be at great risk within a 6-month period. Not having to be immersed in this debacle saves valuable time for setup and, of course, program money.

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                          SSEB
                       Chairperson


   Operations                                              SSEB Deputy
    Officer                                                Chairperson

                      Legal        Procurement
 Operations         Advisor        Contracting
 Assistant                          Officer

          Database                  Contract
          Manager                   Specialist
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ARH SSEB Management Team

In October 2004, the SSEB chairman was selected and began working with the planning cell. This was done to speed the entire process by ensuring that the lead was acquainted with the RFP process and had a good ARH program understanding. The chairman worked with the operations officer to finalize SSEB members, had recurring meetings with key leaders tasked to the SSEB and was involved in finalizing the SSP as well as obtaining both SSAC endorsement and SSA approval.

Dealings with the SSAC, SSAC Chairman and SSA were very important to planning our schedule. We knew we could internally contain the evaluators and SSEB leadership timelines for evaluations and roll-ups of such, but the highest risk overall was the scheduling inclusion of the advisors and authority to the process. This meant planning all dates for briefings within the sequence of events well prior to the SSEB's start, working to deconflict Army general officer and senior executive service civilian schedules,

attaining the SSAC Chairman's concurrence and briefing the SSA for approval. One approach taken was omitting separate briefings between the SSAC and SSA. Though a risk, we opted to conduct the initial and the final evaluation briefings with both the SSAC and SSA members combined. To reduce potential conflict, our management team had an open door to the SSAC Chairman at all times, and this senior official kept the SSAC informed on critical SSEB issues and findings.

Implementing Training
Phase 1 orientation training was completed for all members no later than 15-30 days prior to SSEB start with key tasks to deliver information on organization, source-selection process basics, SSP evaluation criteria and ratings, logistics such as room assignments,

> The internally developed Microsoft® Access centralized database provided the medium for the SSEB members to pass evaluations and reviews seamlessly.

security operations, *FAR* and the macro-level schedule of actions from inception of proposals through SSA selection.

The detailed Phase 2 training was planned two days prior to start of evaluation at the facility. Here, a short organizational update was presented, but the bulk of training was targeted at ensuring that all leaders and evaluators were provided a detailed micro-level schedule of the process of initial evaluations, final evaluations and any additional elements or processes. Additionally, the database manager was tasked to provide a detailed presentation on use of the database followed by a "rock drill" conducted by all participants for an entire half-day. This drill gave all members confidence in database use and provided a final operational test to the

program and server to ensure that any quirks could be fixed prior to reception of proposals from offerors and the actual SSEB onset.

Managing Information

The first step in managing the data-flow requirements for an SSEB is to identify all the potential issues up-front, such as:

• SSEB size — number of personnel, locations for the people and computers, such as centrally located or distributed to several locations.

• Centralized server — contains the master database or decentralized database sections that must be merged to create a complete database.

• Location of database manager — is the manager on-site or on-call?

• Network infrastructure — are there sufficient nodes (connections) to accommodate all SSEB personnel who will require database access? Is it able to handle the data traffic throughput generated by the SSEB's size? The process speed is governed by the slowest component, such as computer network card, network cabling, network switch/hub or server.

• Software — what software will be used to generate and manage the database? Are there sufficient copies or licenses to cover all SSEB participants?

• Training — often an overlooked step or not given the level of importance it is due. This is tied directly to the effort placed in designing the database. The more user-friendly and intuitive the screens, the less training and procedure memorization required by users.

For the SSEB to efficiently handle the large volume of data to review in each proposal, and to eliminate the chance of data mix-up between offerors, we had to keep each offeror's proposals separate during the evaluation process. The internally developed Microsoft®

The ARH PMO set up a management team to lead the ARH SSEB process. (*Army AL&T* Magazine stock photo.)

Access centralized database provided the medium for the SSEB members to pass evaluations and reviews seamlessly. Each SSEB is unique and its structure is tailored to the SSEB Management Team's desires. For the ARH SSEB, the evaluation of each offeror's proposal passed through four separate levels and specific frames/screens — evaluator, element, subfactor and factor — with accompanying reviews at each level. The SSEB process began with the evaluator's input of his/her evaluation and continued through the different leaders at three levels.

Data security and integrity must be strictly maintained. All users had ownership of separate computers and passwords to access the network and database. All evaluations and reviews were traceable back to the originator. The complete database was backed up and verified daily. Keeping all the individual daily backups allowed the SSEB Management Team the flexibility to go back to any particular day to see what the status was of all evaluations; roll-ups; errors, omissions and clarifications; and discussion items.

By planning well in advance, building the appropriate management team and integrating the appropriate tool — a user-friendly database to support execution — the ARH SSEB finished all proceedings required in less than six months and the contract was awarded without protest.

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